

Employee Post-Travel Disclosure of Travel Expenses

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2018 APR 12 PM 3:45

Post-Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building.

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The original *Employee Pre-Travel Authorization* (Form RE-1), AND
☒ A copy of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): Jobs for the Future (JFF) and Lumina Foundation

Travel date(s): 4/5/2018

Name of accompanying family member (if any): N/A

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING DID NOT INCREASE DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input checked="" type="checkbox"/> Good Faith Estimate	\$46.60	\$0.00	\$27.00	\$0.00
<input type="checkbox"/> Actual Amount				

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate				
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): Staff heard about strategies and initiatives to increase credential and high demand career attainment,

including VA's Career and Guided Pathways, Career Coaching, Workforce Credential Grant and Apprenticeship opportunities.

4/10/18

(Date)

Courtney Segmen

(Printed name of traveler)

[Signature]

(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

4/10/18

(Date)

[Signature]
(Signature of Supervising Senator/Officer)

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Date/Time Stamp:

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220**. Incomplete and late travel submissions will **not** be considered or approved. This form **must** be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

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Name of Traveler: Cortney Segmen

Employing Office/Committee: Senator Tim Kaine

Private Sponsor(s) (list all): Jobs for the Future and Lumina Foundation

Travel date(s): April 5, 2018

*Note: If you plan to extend the trip for any reason you **must** notify the Committee.*

Destination(s): Germanna Community College - Fredericksburg, VA

Explain how this trip is specifically connected to the traveler's official or representational duties:

Traveler works on legislative issues involving education and workforce development. The site is doing innovative work around workforce development and lessons can be applied to policy making.

Name of accompanying family member (if any): N/A

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

3/5/18
(Date)

[Signature]
(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, Tim Kaine hereby authorize Cortney Segmen
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

3/5/18
(Date)

[Signature]
(Signature of Supervising Senator/Officer)

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should NOT submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): Jobs for the Future (JFF) and Lumina Foundation.
2. Description of the trip: JFF Congressional Staff Network Site Visit to Fredericksburg Virginia to examine high quality and innovative education and workforce programs. See attachment one for more detail.
3. Dates of travel: April 5, 2018
4. Place of travel: Germanna Community College - Fredericksburg, VA
5. Name and title of Senate invitees: See Attachment one.
6. I *certify* that the trip fits one of the following categories:
 - ☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
 - ~~OR~~
 - ☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
 - ~~AND~~
 - ☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:
 - ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
 - ~~AND~~
 - ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

-OR-

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

-OR-

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

N/A

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

JFF works with Lumina Foundation to select sites and topics around which to base site visits, taking into account

Congressional staff interest, the quality of programming and their relationship to workforce development and

education policy. See attachment one for more detail.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

JFF and Lumina are interested in the development of policies that expand opportunities for low income and

disconnected populations to attain the education, training and credentials necessary to find family sustaining careers.

This trip will examine high quality and innovative approaches happening in the state. See attachment one.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

JFF has planned trips for the Congressional Network on Workforce Development and Economic Security for 10 years.

This is Lumina's first year working on the Network but has previously been involved in other Hill engagement.

See attachment one for more detail.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

JFF and Lumina Foundation work with partners around the country to design and drive the adoption of education and

career pathways approaches, that lead to college, career readiness and career advancement for today's students.

See attachment one for more detail.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate	\$46.60 (includes all transportation. See attachment two for more detail)	NONE	\$27.00 (Per person, for breakfast and lunch. See attachment two for more details).	NONE
<input type="checkbox"/> Actual Amounts				

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

b) The trip involves events that are arranged or organized specifically with regard to Congressional participation.

18. Reason for selecting the location of the event or trip

JFF and Lumina selected Fredericksburg, VA for this visit. The state's education and workforce systems are doing

innovative things in preparing today's learners for future careers. See attachment one for more detail.

19. Name and location of hotel or other lodging facility:

NONE.

20. Reason(s) for selecting hotel or other lodging facility:

NONE.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

The meal expenses align with federal government travel per diem. See attachment two for more details.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

A bus will be provided to transport staff to and from the visit. It is coach bus accomodations.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

None.

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor:

Maria K. Flynn

Name and Title: Maria Flynn, CEO

Name of Organization: Jobs for the Future

Address: 122 C St NW Washington, DC 20001

Telephone Number: 617-728-4446

Fax Number:

E-mail Address: mflynn@jff.org

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM
SIGNATURE PAGE FOR ADDITIONAL SPONSOR
(to be completed by each additional sponsor)

I hereby *certify* that the information contained on pages 1-4 of the certification form and any accompanying addenda, all submitted in connection with the April 5, 2018 trip
to Fredericksburg, VA *Dates of Travel (Month Day, Year)* is true, complete, and correct.
Place of Travel

Signature of Travel Sponsor: 

Name and Title: Jamie Merisotis, President/CEO

Name of Organization: Lumina Foundation

Address: 30 S. Meridian St. Suite 700 Indianapolis, IN 46204

Telephone Number: 800-834-5758

Fax Number: _____

E-mail Address: jmerisotis@luminafoundation.org

Attachment 1.

Congressional Staff Network for Workforce and Economic Security Issues April 5, 2018 Site Visit Fredericksburg, Virginia

Question #2: Description of the Trip

Purpose of the Trip and Mission of the Sponsor. Jobs for the Future (JFF) and Lumina Foundation are interested in the development of education, training and supportive programs and policies that expand opportunities for low income and disconnected youth and adults to attain the education, training and credentials necessary to find good jobs and family sustaining careers. JFF and Lumina's work is informed by research, analysis, and best practice. The purpose of this trip is to examine high quality and innovative education and workforce training programs that focus on the economic needs of the state, its employers and its people. Staff will see innovative programs that meet the skill needs of the region's critical industries, talk with students, teachers, state and local officials and employers who are involved in the development and in carrying out these programs.

Question #5 Senate Staff:

Jake Baker, Professional Staff, Senate HELP Committee

Kelly Brown, Professional Staff, Senate Appropriations Committee

Tanya Das, Policy Fellow, Office of Senator Coons

Thomas Lucas, Legislative Correspondent, Office of Senator Manchin

Lauren Marshall, Legislative Assistant, Office of Senator Warner

Katherine McClelland, Workforce and Education Policy Advisor, Senate HELP Committee

Cortney Segmen, Legislative Fellow, Office of Senator Kaine

Margo Tercek, Legislative Aide, Office of Senator Bennet

Question #12: Role of Sponsor

Role of Sponsor. Jobs for the Future (JFF) and Lumina Foundation work together to select sites and topics of interest around which to base site visits and forums, taking into account congressional staff interest, the quality of programming, and whether or not these programs have a relationship to workforce development and education policy. JFF develops and executes the agenda; arranges logistics for the trip; and communicates with the staff with assistance from Lumina Foundation.

Question #13: Mission of Sponsor

Purpose of the Trip and Mission of the Sponsor. Jobs for the Future (JFF) and Lumina Foundation are interested in the development of education, training and supportive programs and policies that expand opportunities for low income and disconnected youth and adults to attain the education, training and credentials necessary to find good jobs and family sustaining careers. JFF and Lumina's work is informed by research, analysis, and best practice. The purpose of this trip is to examine high quality and innovative education and workforce training programs that focus on the economic needs of the state, its employers and its people. Staff will see innovative programs that meet the skill needs of the region's critical industries, talk with students, teachers, state and local officials and employers who are involved in the development and in carrying out these programs.

Question #14: History of Sponsor

History Carrying out Site Visits. Jobs for the Future has carried out the Congressional Network on Workforce Development and Economic Security for nearly 10 years. As part of that work we have held numerous DC-based local forums and conducted multiple site visits where senior congressional staff have the opportunity to see high quality workforce programs and learn from experts and practitioners on the ground, about the impact of federal policy in their fields of responsibility. Our visits have included programs in: Charlotte, NC; Bridgeport, CT; Cincinnati, OH; Madison, WI; Philadelphia, PA; Detroit, MI, Wichita, KS, Nashville, TN, Seattle, WA and Eastern KY. The purpose of these trips (and the Network) is to provide in-depth learning opportunities for staff on workforce, education, and economic security issues. This is Lumina Foundation's first year co-sponsoring the Congressional Staff Network.

Question #15: Educational Activities of Sponsor

Other Education Activities. JFF and Lumina work with partners around the country to design and drive the adoption of education and career pathways leading to college, career readiness and career advancements for those struggling to succeed in today's economy. JFF is in more than 100 communities across 39 states, JFF improves the pathways leading from high school to college to family-sustaining careers.

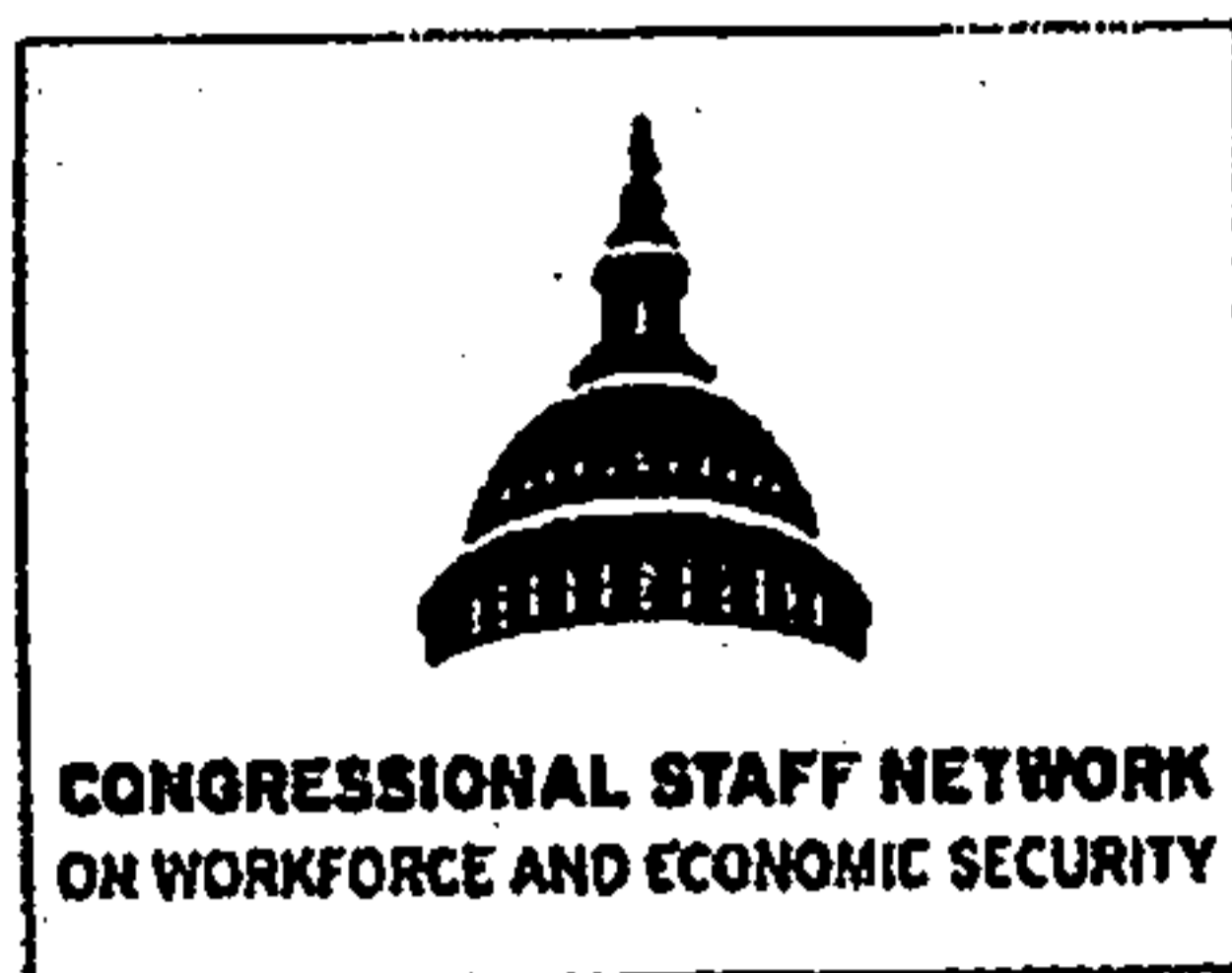
Question #18: Location

Reason for Selecting Location: JFF with the help from Lumina Foundation, selected Fredericksburg, Virginia for this site visit because of the innovative work the state is doing around workforce development. Recently, Virginia was recognized as the top Mid-Atlantic state in annual workforce development rankings and we believe the Commonwealth's commitment to innovative post-secondary skill development is worth highlighting. The visit will shed light on implications for higher education and workforce development policy, specifically on: Pre-apprenticeship and apprenticeship programs, career pathway approaches and strategies for supporting today's most vulnerable postsecondary students.

Attachment 2: Good Faith Estimates for Senate Staff Travel and Meal Expenses

On the ground travel estimates: Transportation (via bus) for one day to and from DC:
\$1,350.00 divided by 29 people = Approx. \$46.60 each.

Meals: The total meal cost will be \$27.00 per person, which is below the government per diem rate of \$38.25.



CONGRESSIONAL STAFF NETWORK SITE VISIT

April 5, 2018 • Virginia

PARTICIPANT LIST

Congressional Staff Participants

Jake Baker
Professional Staff Member
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CONGRESSIONAL STAFF NETWORK
ON WORKFORCE AND ECONOMIC SECURITY

AGENDA

April 5, 2018

Site Visit to Germanna Community College
Fredericksburg, Virginia

- | | |
|------------------|---|
| 8:15 AM | Staff arrive at Garfield Circle
<i>United States Capitol, Washington DC 20016</i> |
| 8:30 AM | Board Bus and Depart for Germanna Community College
<i>1000 Germanna Point Dr. Fredericksburg, VA 22408</i>
ROOM 105A&B |
| 8:30 – 10:00 AM | Travel to Germanna Community College

<u>Overview of Site Visit:</u> Staff will have packets with information about Virginia's Community College and Workforce Development System for the trip to Fredericksburg. Once they have read the materials, we will provide a brief overview of what they will see on the site visit and discuss some of the innovations they will hear about. |
| 10:00 AM | Arrive at Germanna Community College |
| 10:00 – 10:20 AM | Welcome and Introductions |
| 10:20 – 12:00 PM | Virginia's Community College and Workforce Development Systems – Current and Future Innovations

Virginia State officials will discuss the state's many strategies and initiatives to increase students'/workers' credential and high demand career attainment (including Virginia's Career and Guided Pathways, Career Coaches, Developmental Education Redesign, FastForward, Middle College, Apprenticeship, and other initiatives designed to provide Virginians with the skills needed for in demand industries). <ul style="list-style-type: none">• Megan Healy, Chief Workforce Development Advisor, Office of Governor Ralph Northam• Lori Dwyer, Assistant Vice Chancellor for Workforce Policy, Virginia Community College System (VCCS)• Shauna Davis, Executive Director, Student Success Center, Virginia Community College System |



**CONGRESSIONAL STAFF NETWORK
ON WORKFORCE AND ECONOMIC SECURITY**

- 12:00 – 1:30 PM** **Lunch Meeting – Overview of Germanna's student advising, adult career coaching, and workforce programs**
- **Janet Gullickson**, Germanna Community College President
 - **Martha O'Keefe**, Germanna Associate Vice President of Workforce and Professional Development
 - **Stacy Gresham**, Student
- 1:30 – 1:55 PM** **Travel to Germanna's Fredericksburg Center for Advanced Technology (FredCat)**
1325 Central Park Blvd, Fredericksburg, VA, 22401
- 1:55 – 2:35 PM** **Overview and Tour of FredCat**
On the tour, staff will see the college's advanced manufacturing training facility and will discuss education and training efforts and potential policy implications.
- 2:35 – 3:45 PM** **Overview of Germanna's pre-apprenticeship and apprenticeship programs, with discussion of: efforts to help underprepared students gain access to apprenticeship; promising work-based learning strategies; plans for apprenticeship expansion; and employer engagement and support for apprenticeship.**
- **Ben Sherman**, Germanna Workforce Program Coordinator
 - **Dan Sadtler**, Quarry Superintendent for Cedar Mountain Stone
 - **Allen Miller**, Student
 - **Roque Castro**, Chief Communications Officer, Elysium Tech Group
 - **Anders Blair**, Student
- 3:45 – 4:00 PM** **Closing Discussion**
- 4:00 PM** **Board Bus for Departure from FredCat**
- 4:00 – 5:15 PM** **Travel to DC**
- On Bus: Discussion about what was seen on visit and the implications for public policy
- 5:00 PM** **Drop Off at P Circle**
Capitol Circle NE, Washington, DC 20004